SECTION 3. PROPOSAL FORMAT

3.1 TWO PART SUBMISSION

Offerors must submit proposals in two parts:

Volume I - Technical Proposal
Volume II - Financial Proposal

Note: All pages of both proposal volumes must be consecutively numbered from beginning to end.

3.2 TECHNICAL PROPOSAL

3.2.1 A transmittal letter must accompany the proposal. The purpose of this letter is to transmit the proposal and acknowledge the receipt of any addenda. It should be brief and signed by an individual who is authorized to commit the offeror to the services and requirements as stated in this RFP.

3.2.2 Technical proposals must be submitted in a separate sealed package labeled "Technical Proposal" and must bear the name and address of the offeror, the name and number of the RFP and the closing date for proposals on the outside of the package. Inside this package an unbound original, to be so labeled, and five (5) copies shall be provided. The technical proposal shall include:

3.2.2.1. Executive Summary

The offeror shall condense and highlight the contents of the Technical Proposal in a separate section titled "Executive Summary." The Summary shall provide a broad overview of the contents of the entire proposal. This Summary shall also identify any exceptions the offeror has taken to the requirements of this RFP or contract (Attachment A.)

3.2.2.2 Proposed Services - Work Plan

A. The offeror shall provide a detailed discussion of its service capabilities and approaches to address the requirements outlined in Section 2.2 of this RFP. Offerors should fully explain how the proposed services will satisfy the requirements of the RFP and indicate all significant capabilities or issues that will be examined to fulfill the scope of work. In addition, offerors must also submit an actual or redacted work plan for a project that was conducted by the offeror, preferably for one of the references that was provided.

B. The State will evaluate the Offeror's overall approach for managing TOs and satisfying the requirements of this RFP. The items that will be evaluated include:

1. *Understanding* - The Offeror's understanding of the consulting services to be provided. This should demonstrate the understanding of the services expected under this Master Contract.

2. *Project Management Methodology* - The Offeror's approach to managing the overall project and individual Task Orders issued under the Master Contract.

   a. In assessing the overall Project Management approach the State will be looking for the following items:

      - Project Organization (including identification and role of subcontractors other than those used solely to meet MBE participation requirements).
      - Offeror Support Resources that will be available, including Personnel and Technology Resources.
      - Project Management Planning and Tracking System.
      - Project Reporting Methodologies.
      - The personnel who will participate in periodic, scheduled meetings with State personnel and the manner in which the offeror will provide updates/progress reports.
      - The availability of the offeror to perform TOs, including the flexibility to dedicate staff to these efforts.
      - Personnel. A resume must be provided for the proposed Program Manager. (See section 2.9) At least one representative resume must also be submitted for each of the other labor categories described in Section 2.9 of this RFP, with the understanding that a resume must be provided for the proposed Project Manager for each TO. The resumes provided must detail the personnel's education, certification(s), training, general and specialized experience, skills and abilities, and size and scope of projects supported. The personnel for whom resumes are submitted must be employed by the offeror as of the proposal submission date.

   b. In reviewing the Project Management Methodology for Task Orders, the following items will be assessed:

      - The process for responding to TO Bid Requests
      - Task Order Control
        - Cost Controls
        - Schedule Control
        - Problem Tracking and Resolution
        - Risk Assessment and Management
      - Monthly Progress/Status Reporting
      - Quality Assurance
      - Subcontractor Management

- Management Planning and Reporting

3. *Experience and Stability*

Offerors must include information on past experience with similar projects and pertinent corporate resources and must include the following sections:

a. An overview of experience rendering services similar to those included in Section 2.2 of this RFP. This description must include a summary of the services offered, the number of years the offeror has provided these services, the number of clients and geographic locations the offeror currently serves, etc.

b. References from at least three of its largest customers who are capable of documenting:

(1) The offeror's ability to manage projects of similar complexity.
(2) The quality and breadth of services provided by the offeror.
(3) Each client reference is to include the following information:
Name of client organization; Name, title, and telephone number of Point of Contact for client organization; Value, type, and duration of contract(s) supporting client organization.
(4) An explanation of why the offeror is no longer providing the services to the client organization, if the offeror is no longer serving this client.

c. Legal Actions Summary. The offeror must include the following:

(1) A statement as to whether there are any outstanding legal actions or claims against the offeror, and a brief description of any such action.
(2) A brief description of any settled or closed legal actions or claims against the offeror over the past five (5) years.

d. Financial Capabilities And Statements.

(1) Evidence that the offeror has financial capacity to provide the services.
(2) Copies of the last two (2) year end financial statements or best available equivalent report.

4. *Economic Benefit to the State of Maryland*

A general description of how performance of TOs by the offeror will benefit Maryland. It is understood that because of the task order nature of the Master Contract that an offeror cannot make specific commitments of personnel and resources in the Master Contract proposal response. However, the offeror should describe in general terms, the following:
The Offeror shall describe the benefits that will accrue to the Maryland economy as a direct or indirect result of the Offeror's performance of the contract resulting from this

RFP. **Note: do not include total contract dollars taken from the financial proposal in completing this section. Use percentages where appropriate (see below).**

Economic benefits include:

- The percent of the contract dollars to be recycled into Maryland's economy in support of the contract, through the use of Maryland subcontractors, suppliers, and joint venture partners. Offerors should be as specific as possible and provide a percentage breakdown of expenditures in this category.

- The numbers and types of jobs for Maryland residents resulting from the contract. Indicate job classifications, number of employees in each classification, and the aggregate Maryland payroll percentages to which the contractor has committed at both prime and, if applicable, subcontract levels.

- Tax revenues to be generated for Maryland and its political subdivisions as a result of this contract. Indicate tax category (sales tax, inventory taxes and estimated personal income taxes for new employees). Provide a forecast of the total tax revenues resulting from the contract.

- Subcontract dollars committed to Maryland small business and MBEs.

In addition to the factors listed above, the Offeror should explain any other economic benefit to the State of Maryland that would result from the Offeror's proposal.

3.2.2.3 Requirements Related to Conflicts of Interest

Attachment J is a list of all Statewide IT and telecommunications contracts and vendors for information purposes only. Offerors, in submitting their proposals, shall identify all existing or potential Conflicts of Interest with contractors listed in Attachment J that would prevent an offeror from fully performing the tasks described in this RFP.

3.2.2.4 Required Submissions

A. Bid/Proposal Affidavit - Attachment B
B. Certified MBE Utilization and Fair Solicitation Affidavit - Attachment D-1

3.3 CLIENT REFERENCE SURVEYS

As part of the response to this proposal, Offerors are required to submit three (3) client references for projects similar to the requirements in Section 2.2. A copy of the blank Client Reference Survey Form is located in Attachment G. Completed Client Reference Surveys MUST be included in the **original Technical Proposal** as part of the vendor's proposal as follows:

- To ensure accuracy, offerors must complete all the Project Header information, down to question one (1), prior to sending out the Client Reference Survey to the client providing the reference.
- Client Reference Surveys should be completed INDEPENDENTLY by the client providing the reference. Please DO NOT use subsidiaries or any other entity within your company as a Client Reference.
- The individual completing the Client Reference Survey should sign the completed survey with an ORIGINAL SIGNATURE. See Attachment G.
- In order to maintain confidentiality of the completed Client Reference Surveys the individual completing the Client Reference Survey MUST return it to the vendor in a sealed envelope. In addition, the individual completing the Client Reference Survey should sign their name as shown in Attachment G of the Client Reference Survey.
- Clients that refuse to complete the Client Reference Survey should be requested to note refusal on the face of the survey and sign and return as indicated in this section.
- Offerors that have clients who refuse to return a Client Reference Survey, should provide a statement in place of the required form indicating the client's name, contract, address, phone number and that the client refuses to complete the form.

3.4 FINANCIAL PROPOSAL

Under separate sealed cover from the technical proposal and clearly identified with the same information noted on the technical proposal, the contractor must submit an original and five (5) copies of the financial proposal. The financial proposal must contain all cost information in the format specified in Attachment E of this RFP. Offerors will record their prices into the appropriate column for all labor classes.

ADDITIONAL COMPENSATION. Where travel may become necessary in the performance of a specific task order within Maryland, the selected contractor, with the approval of the user agency, may be reimbursed for mileage between one State facility and another State facility if the distance to be traveled between locations exceeds 25 miles one-way. The reimbursement rate will be at the then current State of Maryland mileage reimbursement rate. Currently the mileage rate is $.32 per mile. Contractor may also request travel time reimbursement at the contracted price for the specific labor category(ies) in a travel mode but no more than a maximum of 4 hours in a single day while actually traveling between government sites. No other reimbursements will be allowed. Travel reimbursement will only be made for State approved travel. If non-local personnel are used by the contractor for any task order, the contractor will not be reimbursed for non-local personnel travel. Non-local personnel will be considered as local for the purposes of any resulting contract.

An example: A task order identifies government site work will be performed by a program manager at 301 W. Preston Street. In addition, the task order requires the contractor's program manager to visit an additional State facility in Ocean City, Maryland for three days. The contractor may quote to the current contract actual price of the work plus travel time and mileage to and from the remote State facility. Thus, if the program manager rate is $150 per hour, the travel hours are 4, and mileage is 125, each way. The additional reimbursement to the contractor for this work, if approved by the user agency, would be $1,264.00. This figure represents the $150 per hour program manager rate times 8 hours round trip travel and 200 miles (This number is less 25 miles each way.) times $.32 mileage reimbursement. Additional compensation will not be granted for portal-to-portal contractor sites.

Loaded hourly rate means a rate that includes all direct and indirect costs, including overhead, General and Administrative, purchasing burden, and profit, associated with providing the specific labor classification to perform work on any task order. No other charges may be added to the labor rate. Additional labor categories may not be added to the Contract after award. Pay special attention not to include any prices for labor categories not included within the proposed functional area. Rates that are considerably lower than current industry rates for similar personnel will be considered unreasonable or unbalanced and may be grounds for rejection of the Offeror's proposal.

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